



TS EAS

This meeting is being recorded!

Wednesday 28th: 9pm PST / 10pm MST / 11pm CST

Thursday 29th: 0am EST / 5am UTC / 6am CET / 7am

EET, CAT, SAST / 10.30am IST / 1pm CST / 4pm AEDT



Notes

All

Reports and status updates

Team leads and liaisons

Lara: Standards Committee



Standards Committee

- RiC
 - SAA Council approved the recommendation from the Standards Committee to delay integration with RiC until its application guidelines were fully considered and released. ([0224-IV-A-Stands](#))
 - SAA Council approved the Standards Alignment statement, which will be published on the SAA website at the recommendation of the Technical Subcommittee on Encoded Archival Standards (TS-EAS). ([0224-IV-A.1-TSEAS](#))
 - SAA Council approved the statements regarding RiC, which will be made available on the SAA website as advised by Technical Subcommittee on Describing Archives: A Content Standard (TS-DACS). ([0224-IV-A.2-TSDACS](#))



Standards Committee

- **ARM revision cycle**
 - SAA Council approved the recommendation from the Standards Committee to initiate a new revision cycle for the Arts and Rare Materials (ARM) extension to BIBFRAME and for the committee to reach out to ARLIS and RBMS to seek their support and participation. ([0224-IV-B-Stands](#))
- **DACS standing rules revision**
 - Approved the standing rules of the Technical Subcommittee on Describing Archives: A Content Standard (DACS). ([0224-IV-C-DACS](#))
- **Standards Committee working on integrating Diversity, Equity, Inclusion, and Accessibility (DEIA) into its proposal form.**

Kelly/Janaya: SAA EAS Section



EAS Section

From October meeting
(2023-10-24)

- New members:
 - Janaya Kizzie, Co-Chair, 2023-2025
 - Jacqueline Devereaux Asaro, Steering Committee Member, 2023-2025
 - Laurie Lee Moses, Steering Committee Member, 2023-2025
- "Recommended Tools and Resources page" on the EAS Section microsite update
- Continuing to partner with EAS groups for webinars
- Continuing to liaise between groups

Karin: EAC-F



Encoded Archival Context - Functions

- Mockups being worked through
- White paper on its way
- Awaiting Relations to be finalised
- Working with Outreach on how to publish and collect comments
- Will sync release call for comments with release of EAD revision call for comments



Notes!

- <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/functions-subteam/meeting-minutes>

~~Marie~~ Karin: EAC-CPF

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EAC-CPF subteam

Membership

Current members:

Ailie Smith (Australia)
Gerhard Müller (Germany)
Iris Lee (United States)
Karin Bredenberg (Sweden)
Kerstin Arnold (Germany)
Marie Elia (United States)
李彦霖 Li Yanlin (China)
Silke Jagodzinski (Germany) (*ex officio*)

Meets virtually via Zoom, monthly 1st Thursday (11:00am UTC)



EAC-CPF subteam

Updates:

- Minor revision, EAC-CPF v2.0.1, is published.
- EAD and EAC-CPF teams released a joint announcement for both minor revisions in January.
 - [Email](#) to listservs
 - Announcement on EAC and EAD websites
- [EAC](#) website updated (thank you, Gerhard!)
- [Tag library](#) updated (thank you, Ailie!)
- [Best Practice Guide](#) updates are ongoing (thank you, Iris!)



EAC-CPF subteam

Ongoing: Anticipating major revision (EAC-CPF 3.0) after EAD 4.0 release

- Main topic of conversation between EAC and EAD teams has been <relations>.
- Relations (“relations” conceptually as well as similarly named elements/attributes) are defined differently in EAC; plan to provide more clarity and examples around this area.
- Once EAD 4.0 is released, we will begin reviewing for alignment.

Slowed: Community engagement

- Still prioritizing assessing how EAC is used in the archival community but stepping back to avoid “survey fatigue” and confusing with call for feedback on EAD revision.

Kerstin: EAD



The team

- Current team
 - Alex, Andrew, Erick, Florence (ex officio), Karin, Kerstin (team lead), Marie (EAC team lead), Mark (Schema team lead), Martin, Mary (co-chair liaison), Otshidile, Silke (ex officio), Venkat, 李彦霖 Yanlin (Ellen)
- Monthly meetings
 - Currently: **fourth** Friday each month
 - Usually 1.5 hours, 1pm UTC
- Always open for new members with fresh eyes and new perspectives



What happened since October (1)

- Minor revision to the EAD3 Tag Library released
 - Thank you to Alex for the updates
 - Joint announcement with EAC-CPF team and minor revision of EAC-CPF 2.0 TL
- Topics discussed as part of the major revision (monthly meetings)
 - Element and attribute names (follow-up of introducing camelCasing to EAD and with focus on, but not only for abbreviated element and attribute names)
 - <sourceOfAcquisition>, <identificationData> and <identificationDataNote>, <descriptionOfComponents> and @descriptionOfComponentsType, <otherDescriptiveInformation>, <physicalOrTechnicalRequirements>, <languageOfMaterial>



What happened since October (2)

- Topics discussed as part of the major revision (monthly meetings)
 - Attributes @valueURI, @vocabularySource and @vocabularySourceURI
 - Also enabled with <archDesc>, numbered and unnumbered <c> elements, <container>, <materialSpec>, <physFacet>, and <unitType> as well as <otherFindAid>, <publicationNote>, <relatedMaterial>, <separatedMaterial>, <formAvailable>, <accessConditions>, and <useConditions>
 - Formatting in EAD 4.0
 - Concentrate on encoding information, not on encoding how this information is displayed
 - New choice between <p> (retained as an EAD element) and <formattingExtension> (to allow more detailed formatting encoding with XHTML elements)



What happened since October (3)

- Topics discussed as part of the major revision (monthly meetings)
 - The shared element <legalStatus>
 - Adapt to how it is defined in EAC-CPF 2.0 and move into <identificationData>
 - The shared elements <function> and <occupation>
 - Adapt <function> to how it is defined in EAC-CPF 2.0 and move into new section for entity elements, also adopting EAC-CPF's approach of plural and singular elements
 - Integrate <occupation> with the new <subjectHeadings><subject> approach
 - Add a new element <referringString> next to and <reference> for mixed content encoding
 - Numbered and unnumbered <c> elements
 - Keep both options in the extended schema of EAD 4.0 (for now) and aim at only having unnumbered <c> elements in the core schema of EAD 4.0



What happened since October (4)

- Topics discussed as part of the major revision (monthly meetings)
 - Relations in EAD 4.0 (together with representatives of EAC-CPF and Functions teams)
 - Separate topic on definition of <relations> and <relation>
 - Elevate <agent>, <formAvailable>, <function>, and <place> to related entity elements with their own plural-singular section in <archDesc> and <c> elements
 - <agent> integrates <origination>, <repository> and agent-related sub-elements of <controlaccess>
 - <formAvailable> integrates <dao>, <daoset>, <altformavail>, and <originalsloc>
 - Integrate <controlaccess> and <index> into a new element <subjectHeadings> concentrating on the aspect of “about-ness”
 - Only with the sub-element <subject> (integrating the remaining access elements <genreform> and <occupation>, while encoding titles would be recommended in <publicationNote>)



What happened since October (5)

- Topics discussed as part of the major revision (monthly meetings)
 - Data type for attributes with any textual values
 - E.g. @calendar or @era, but also @languageCode or @status
 - Will now all have the more relaxed data type “token” (instead of “NMTOKEN”)
 - The element <genreForm>
 - Has effectively been removed from EAD 4.0 with the change to <subjectHeadings> and the new approach to mixed content with <referringString>
 - The elements <unitDate> and <unitDateStructured>
 - Kept as is for now
 - Will be a topic for one of the drop-in sessions (how much structure is needed/wanted/used?)



What happened since October (6)

- Topics discussed as part of the major revision (monthly meetings)
 - Feedback from aggregators' engagement activity
 - Add <places> with sub-element <place> to the group of entity elements (i.e. alongside <agent>, <formAvailable> and <function>)
 - Consider additional aspects to be encoded with <formAvailable> (e.g. <accessConditions> and <useConditions>)
 - Will be a topic for one of the drop-in sessions



Status of EAD 4.0 draft

- Latest version of the [EAD schemas](#) (XSD, RNG) in the [development branch](#)
- [Major revision project](#) on GitHub
- Additional documentation in preparation for call for comments (current versions in TS-EAS internal Google Drive folder):
 - Editorial_ChangesInEAD4.0
 - _FromEAD3toEAD4.0_Changes_TransformationRoutes
 - ExampleFiles
 - _draft_20240304_CallForComments_EAD4.0



Engagement activities together with Outreach

- EAD introduction for East Asia
 - Planned for 21 May, 6.30pm China Standard Time and 7.30pm Japan / Korea Standard Time
 - Programme details to be discussed once the call for comments is published
- Engagement activity with aggregators on EAD 4.0
 - End of January to end of February
 - Conversations with 3 aggregators from the US, 1 from Australia, and 2 from Europe
 - 4 meetings in total (2 per continent(s) group)
 - General appreciation of alignment with EAC-CPF, simplifying terminology, camel casing and emphasis of agents; emphasis to stress benefits of EAD 4.0 and to collaborate with software providers/developers for uptake; note on complexity resulting from variety of schemas
- Engagement activities alongside the call for comments
 - See next slide for details



Ongoing tasks between now and May

- Call for comments
 - Will open next week
 - Will remain open until end of June
 - Accompanied by blog post series on [Descriptive Notes](#)
 - Intended publication schedule: 4/5 March, 25/26 March, 22/23 April, 20/21 May and 10/11 June
 - Accompanied by public drop-in sessions
 - Intended schedule: weeks commencing 15 April, 13 May, 3 and 24 June
 - EAD team will continuously review and discuss feedback received
- Further documentation to share with community throughout the call for comments

Mark: Schema




Overview

- Current members
 - Ailie, Alex, Iris, Kerstin, Karin, Mark, Mpho
 - New members always welcome!
- Current meeting schedule
 - Second Friday of each month, 10 a.m. EST / 4 p.m. CEST
 - Next meeting: *Friday, March 8th*



Our work

- Primarily handled in four different GitHub repositories:
 - **Best Practises Website:**
 - <https://github.com/SAA-SDT/EAS-Best-Practices>
 - <https://saa-sdt.github.io/EAS-Best-Practices/>
 - **EAS Schemas** (EAD 4 + EAC-CPF 2)
 - <https://github.com/SAA-SDT/eas-schemas/tree/development>
 - **EAS Schematrons** (also shared)
 - <https://github.com/SAA-SDT/eas-schematrons>
 - ****New**** EAD4 file:
<https://github.com/SAA-SDT/eas-schematrons/blob/ead4/schematron/ead.sch>
 - **Tag Libraries** (again, shared)
 - <https://github.com/SAA-SDT/EAS-TagLibraries>



Current focus: now - next TS-EAS meeting

- EAD4 Schema / Schematron!
 - E.g., still need to add XHTML validation support to the new `<formattingExtension/>` element.
- Deciding on how to manage TS-EAS-defined controlled lists
 - E.g., whether to use SKOS to define the EAD “level” attribute list
- Archiving and/or updating legacy GitHub repositories

Cory: Outreach and Communications



Sub-team members and charge

<https://bit.ly/ts-eas-oc>

- Karin Bredenberg (liaison)
 - Mary Samouelian (liaison)
 - Glenn Gardner
 - Cory Nimer (Co-Chair)
 - Jane Gorjevsky (Collection Management Section liaison)
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- Promote broader awareness of TS-EAS' activities and its work plans, across a range of key stakeholders and audiences
 - Liaise with the EAS Section leadership on communications, education, and outreach plans



Ongoing work

Coordination for upcoming webinars

**Full committee
discussion points or updates**

Updates from the co-chairs

Co-chairs





Memberships

- Update on membership submission to SAA
 - Sent in for re-appointments/new appointments on January 12, 2024 (due date was January 15, 2024)
 - Didn't get many applicants from the U.S.
 - No hard date as to when we may hear back from SAA Appointments committee



SAA annual meeting Chicago 2024

- TS EAS proposal submitted for session at SAA annual meeting in Chicago
 - Morning session similar to the previous EAD Brown bag lunches
 - Should hear back no later than March 20, 2024
- Drafting an agenda for our annual TS EAS meeting (August 12-14, 2024) is in the planning
 - Preliminary draft
 - August 12-13, 2024: 2 full-days meeting devoted to EAD 4.0 revision (internal meeting)
 - Review feedback from call for comments
 - Possible open meeting with software providers/developers if there is an interest
 - Updates/next steps
 - August 14: 1 full-day meeting for TS EAS
 - Morning: opportunity for sub-teams to meet
 - Afternoon: 1.5-2 hour open meeting for TS EAS (in-person/hybrid)
- Invitations will be sent out soon!



SAA Council meeting February 5-6, 2024

- Update on proposed revision of Statement on Standards (concerning RiC)
 - As discussed at annual meeting in DC 2023
 - Submission from Standards Committee, TS EAS and TS DACS
 - Statements for all three groups



SAA Council meeting May 1-2 2024

- Submission for May SAA Council meeting
 - Regarding financial support for TS EAS annual meeting in Chicago - room/av equipment
 - Regarding financial support for TS EAS annual meeting - food for onsite participants
 - Travel is not something that will be supported by SAA

Relations

EAD team





The definition of <relations> and <relation>

- Current suggestions resulting from the major revision of EAD
 - No changes for <relations> compared to EAC-CPF 2.0
 - One minor change for <relation> compared to EAC-CPF 2.0
 - The required attribute @targetType (in the sub-element <targetEntity>) is turned into an optional sub-element of <relation> directly
 - This new element sits next to <relationType>, <targetRole>, and <place>
 - <targetType> has the same content model as <targetRole>
 - Can contain text and allows for the vocabulary attributes and @localType with @localTypeDeclarationReference next to the usual set of optional attributes for all EAD elements
- **Nothing major** in terms of how these elements are defined
- Final **confirmation** will **only** be available **after** the **second call for comments**



The use of <relations> and its sub-elements

- Conceptual difference between the draft of EAD 4.0 and EAD3 on the one hand and EAC-CPF 2.0 on the other hand
 - In **EAC-CPF**, <relations> is a **separate and optional part in <cpfDescription>** next to the mandatory <identity> and the optional <description> parts
 - In **EAD3**, this was - kind of - adopted by having <relations> as an **optional part in <archdesc> and the <c> elements** next to the required <did> element and in the same group as elements such as <relatedmaterial> and <controlaccess>
 - The **EAD 4.0** draft now suggests to use <relations> as an **optional extension to existing elements that represent related entities** rather than using it in parallel to these elements
 - Depending on the element in question, this can take different forms



<relations> and its sub-elements in EAD 4.0 (1)

- Scenario 1: Elements allowing for more extensive descriptive parts
 - <otherFindAid>, <publicationNote> (renamed from <bibliography>), <relatedMaterial>, <separatedMaterial>, and <formAvailable> (as a combination of <dao>, <daoset>, <altformavail>, and <originalsloc>)
 - Include <relations> next to <abstract> and the choice between <p> and <formattingExtension>
 - Three possible stages:
 - Only literal description of the related entity
 - Additionally (or only) pointing to external vocabularies for more information about the related entity with @valueURI etc.
 - Additionally providing details about the relation(ship) between the related entity and the materials described in <relations>



<relations> and its sub-elements in EAD 4.0 (2)

- Scenario 2: Entity elements
 - <agent>, <function>, <place>, <subject>
 - Include sub-elements of <relation> to enable the provision of details about the relation(ship) between the entity in question and the materials described
 - All four include <relationType>
 - <function> and <subject> include <targetRole> and <targetType>
 - <agent> and <place> include specifically names <agentRole> and <agentType> respectively <placeRole> and <placeType> sub-elements
 - Same three possible stages from only naming the related entity via pointing to an external vocabulary to including details about the relation(ship)



Resulting changes in EAC-CPF 2.0

- **Minor changes**

- Add the optional <relationType>, <targetRole>, and <targetType> to <function>
- Add the optional <placeType> and <relationType> to <place>
- Turn the required attribute @agentType into an optional sub-element <agentType> and add the optional <agentRole> and <relationType> to <agent>
- Also add the optional sub-elements <date>, <dateRange> or <dateSet>, <placeName> and <descriptiveNote> to <agent> to align with other singular elements

- **Major change**

- Remove option to contain text from <agent>
- Require sub-element <agentName> instead (similar model to <place>)

Any other business items?

All

Thank you!

Next all TS-EAS meeting:

- May
- SAA Annual meeting
- October
- February (aim: time better for members in the timezones with more than +5 from GMT)